Premier Miton
INVESTORS

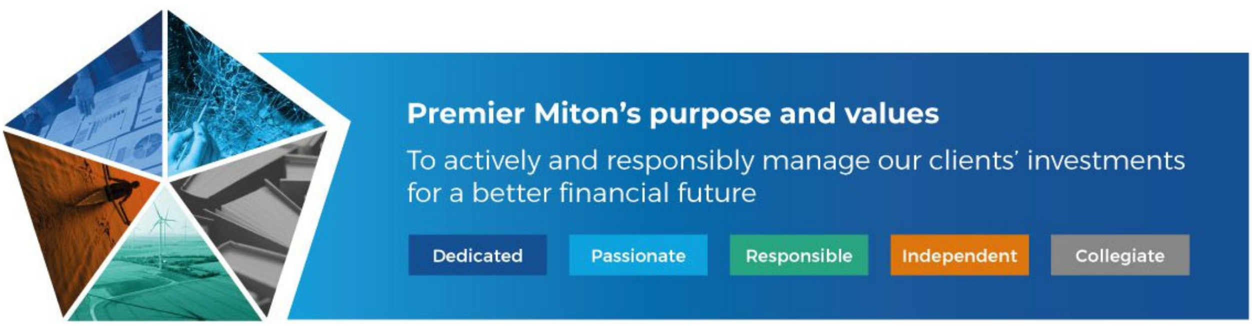
Client Services Administrator

We are looking for a Client Services Administrator to join our Distribution team based at our London office, there may occasionally be some travel to attend relevant meetings, generally in the UK. The role involves hybrid working with at least two days office based.

The successful candidate will provide support and conduct administrative functions for the Distribution team. The role covers a varied list of tasks to support the efforts of the Distribution team, including but not limited to, client liaison activities, reporting, event planning, and team assistant duties. The role reports directly to the Client Services Administrative Lead but has a variety of stakeholders across the business.   The role is fast paced with a variety of priorities but grounded by a customer service focus.

If you are interested in the role, please send your CV (together with details of current salary) to:

Emma Burgess, HR Associate
HR@premiermiton.com



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Principal Responsibilities / Deliverables

Responsibility	Associated Tasks / Deliverables
Maintenance of the CRM System (Salesforce)	• Input, update and ongoing maintenance of data via multiple channels into Salesforce in a timely manner. • Transfer data from VoiceNotes into Salesforce adhering to internal deadlines. • Processing all required information for Events/Campaigns adhering to internal deadlines. • Produce regular reporting to support the wider Distribution Team efforts • Ad hoc reporting in a timely manner • Ad hoc internal/external requests for data inputting to be processed according to procedures and internal deadlines. • Working with the wider business to update clients marketing requests in alignment with GDPR policies. • Continuous learning and proactive projects to review how Salesforce is used and how this can benefit PMI.
Reports/Analysis/Information Requests	• Coordinate Private Clients report requests and log these for audit purposes. • Coordinate ad hoc fund/product information requests received from IFA's, Wealth Managers and retail clients. • Use industry tools to create performance, risk information and comparative information against key competitors on the range of Premier Miton products. • Produce internal periodic reporting in alignment with procedure
Support	• Support the Distribution team members with ad hoc client requests and manage/prioritise these alongside business-as-usual requirements. • Keeping multiple email inboxes up to date, and actioning requests in alignment with internal deadlines and processes • Working as a team collegiately to prioritise workloads in response to demands from the team/business • Minute taking and action logs for internal/external meetings as and when required • Prepare and distribute presentation and marketing material as and when required. • Manage travel and accommodation arrangements for the distribution team as and when required • Attend and participate in internal/external meetings, as required. • Assist Head of Internal Sales & Client Service and Client Services Lead with additional tasks and projects as required.

Events	• Supporting the events process end-to-end process for the Distribution team. • Liaising with venues and sharing best practice within the team. • Processing all documentation to timescales for individual events making sure information is accurate, compliant and stored for audit purposes. • Manage events campaigns via Salesforce end to end. • Produce CPD certificates post-events, where required. • Manage itineraries where requested. • Process any documentation requested by compliance and legal in alignment with our internal Gifts, Hospitality and Non-Monetary Benefits Policies, such as non-monetary benefit forms. • Following up on the invitation process with delegates, seeking confirmation of attendance and gathering personal information such as dietary requirements.
Other	• General support and any other ad-hoc requirements to the client services team, as required • Ad hoc support to the facilities department to cover absence • Ad hoc support with the facilities department to support internal events, including client visits.
Individual Conduct	Whilst carrying out all the previous responsibilities, you should: • Act with integrity. • Act with due care, skill and diligence. • Be open and co-operative with the FCA. • Pay due regard to the interests of customers and treat them fairly. • Observe proper standards of market conduct

Education, Experience, Skills and Abilities

	Essential / Desirable
Education / Qualification • Educated to GCSE level or equivalent	E
Experience / Knowledge • Experience of working in Client Services in the finance industry, preferably in Fund Management, Wealth Management or other similar customer facing role	D
Skills • Team player with a positive, results orientated approach; • Communication skills with the ability to communicate effective – both written and verbally at all levels; • Strong Interpersonal skills; • Ability to prioritise workload and adhere to deadlines; • Good Problem Solving skills. • Ability to demonstrate tact and diplomacy when coping with difficult situations; • Good administrative and personal organisational skills; • Good numeracy skills. • Good IT skills / ability to use Microsoft Office and Excel.	E E E E E E E E E
Characteristics • Ability to work under considerable pressure and adhere to strict timescales. • Attention to Detail	E E